

FIG. 1

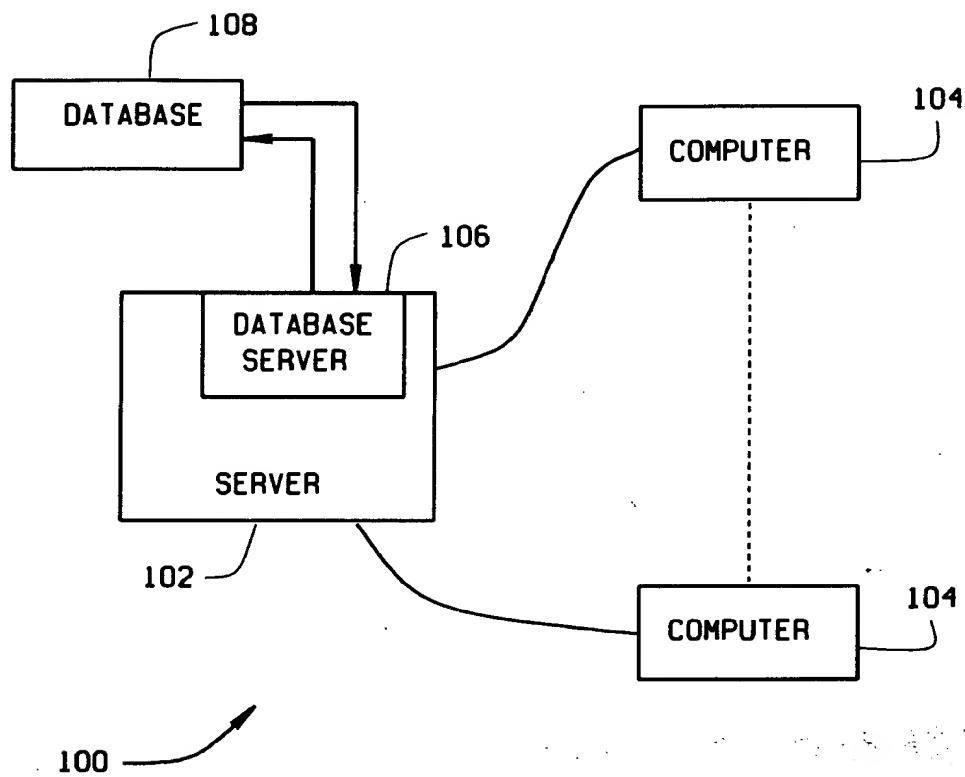
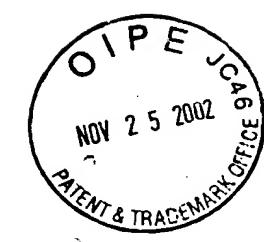


FIG. 2



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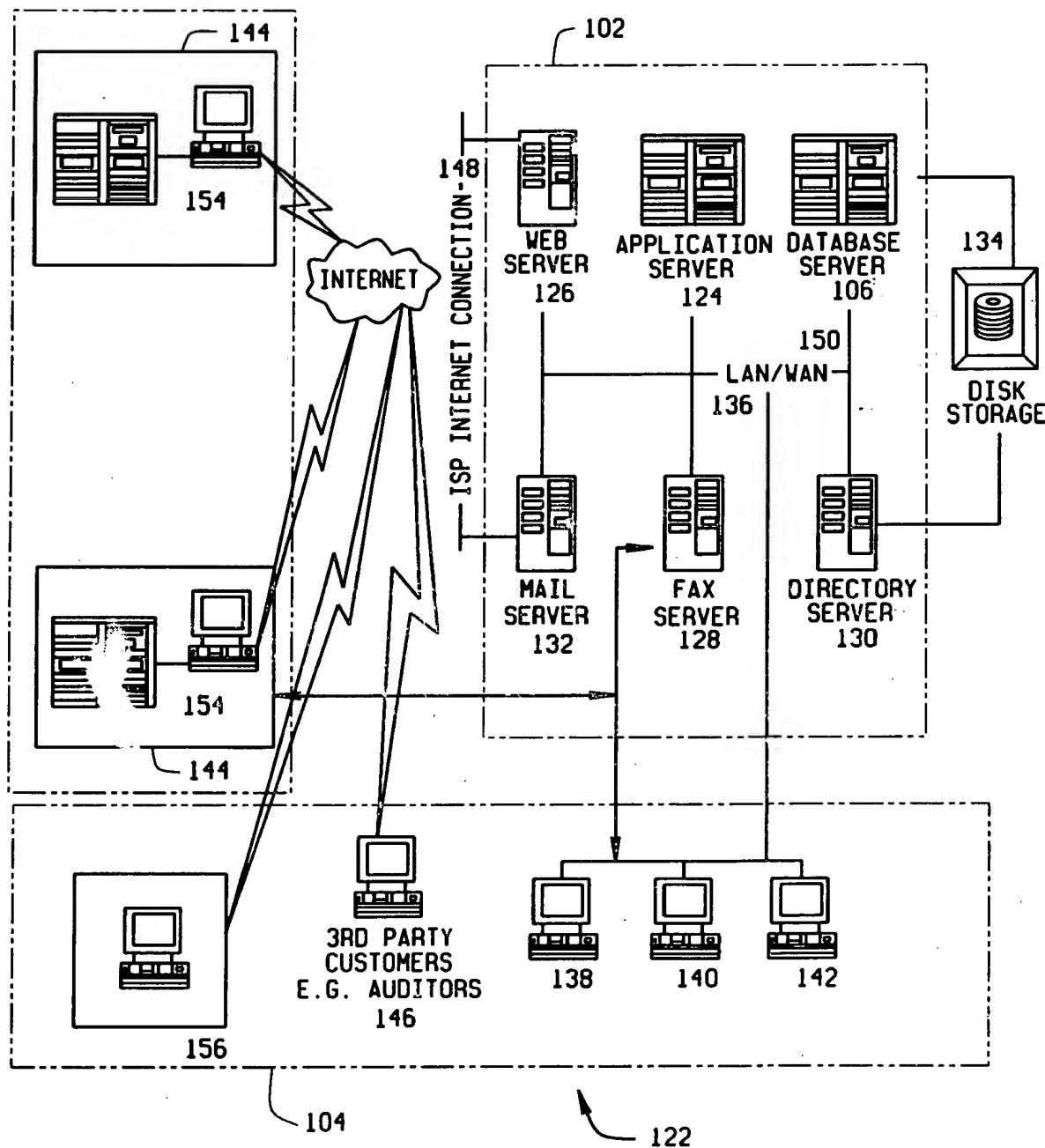


FIG. 3



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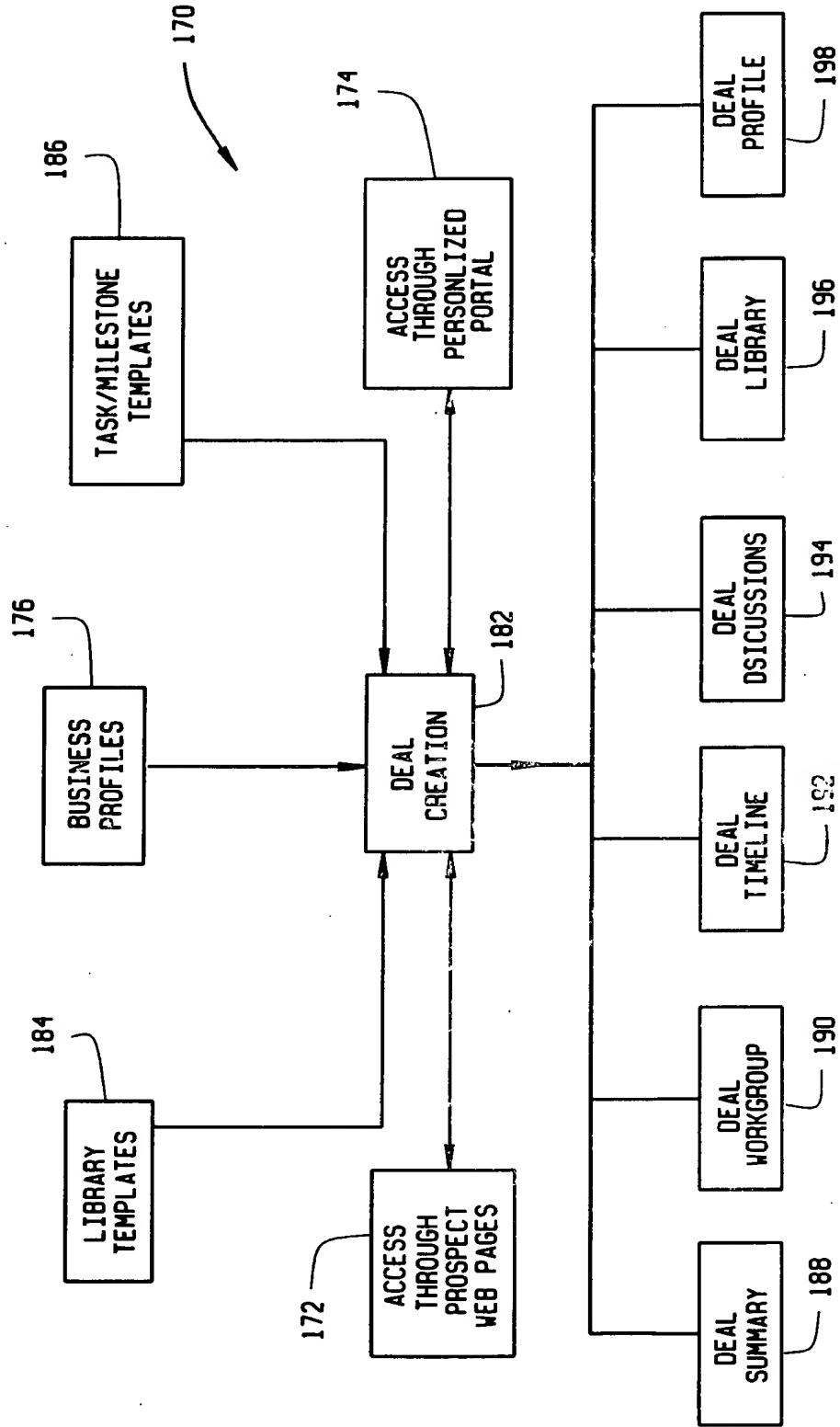


FIG. 4



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BUSINESS PROFILE							
BUSINESS NAME:	SFG	GO TO MARKET NAME:	SFG	HEADER GRAPHIC:	SFG-GIF	<input type="button" value="BROWSE"/>	
SELECT FUNCTIONALITY:		<input type="checkbox"/> USER ALERTS <input type="checkbox"/> DEAL GROUPS		<input type="checkbox"/> DOCUMENT SEARCH <input type="checkbox"/> DEAL SEARCH		<input type="checkbox"/> INVITE PROSPECT	
INFORMATION VISIBILITY: VIEW ACROSS BUSINESS VIEW ACROSS DIVISION							
DEAL VISIBILITY:							
AUTHORITY LEVEL		ACTIVE DEAL		CLOSED/LOST		VIEW	
BUSINESS USER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUTHORITY LEVEL		CREATE/		LIBRARY		SEARCH	
AUTHORITY LEVEL	CREATE	CREATE/	MODIFY	DELETE	VIEW	DEALS	DOCUMENT
USER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MANAGER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/> <input type="button" value="CONTINUE"/>							

FIG. 5



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BUSINESS UNIT HIERARCHY		GO TO MARKET NAME
SFG	DIVISION/SUB DIVISION	
ENERGY	<input type="button" value="CREATE SUB DIVISION"/>	ENERGY
COAL		COAL
GAS		NATURAL GAS
PIPELINE		PIPELINE
TELECOM	<input type="button" value="CREATE SUB DIVISION"/>	TELE-COMMUNICATIONS
CABLE		CABLE
CELLULAR		CELLULAR & WIRELESS
<input type="button" value="CREATE DIVISION"/>		
<input type="button" value="DONE"/>		<input type="button" value="CANCEL"/>

FIG. 6



Applicant: Hornick et al. Serial No: 09/771,358 Atty. Dkt. No: 17243-00035  
Title: METHODS AND SYSTEMS FOR IDENTIFYING PROSPECTIVE CUSTOMERS  
AND MANAGING DEALS  
John S. Beulick; Armstrong Teasdale LLP  
One Metropolitan Square, Suite 2600, St. Louis, MO 63102 (314) 621-5070

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CREATE DIVISION PROFILE		
DIVISION NAME:	<input type="text" value="ENERGY"/>	
GO TO MARKET NAME:	<input type="text" value="ENERGY"/>	
HEADER GRAPHIC:	<input type="text" value="SFGLOGO-GIF"/> <input type="button" value="BROWSE"/>	
DEAL VISIBILITY:		
AUTHORITY LEVEL	ACTIVE DEAL <input type="checkbox"/> VIEW <input type="checkbox"/> MODIFY	CLOSED/LOST <input type="checkbox"/> VIEW
DIVISION USER	<input type="checkbox"/>	<input type="checkbox"/>
DIVISION MANAGER	<input type="checkbox"/>	<input type="checkbox"/>
DIVISION ADMIN	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>		

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CREATE SUB-DIVISION PROFILE	
DIVISION NAME:	ENERGY
SUB-DIVISION NAME:	<input type="text"/> GAS
GO TO MARKET NAME:	<input type="text"/> NATURAL GAS
HEADER GRAPHIC:	<input type="text"/> SFGLogo-GIF <input type="button" value="BROWSE"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 8

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LIBRARY TEMPLATES					
DIVISION: DIVISION 1					
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE	
NEW TEMPLATE FOR DIVISION 1		TRENT	01/01/2000	<input type="checkbox"/>	
TEMPLATE 1	✓	TRENT	01/01/2000	<input type="checkbox"/>	
TEMPLATE2		TRENT	01/01/2000	<input type="checkbox"/>	
DIVISION: DIVISION 2					
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE	
TEMPLATE 1		JOHN	01/01/2000	<input type="checkbox"/>	
TEMPLATE2	✓	TOM	01/01/2000	<input type="checkbox"/>	
DIVISION: DIVISION 3					
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	REMOVE	
TEMPLATE 1	✓	JOHN	01/01/2000	<input type="checkbox"/>	
TEMPLATE2		JILL	01/01/2000	<input type="checkbox"/>	
				<input type="checkbox"/>	CREATE TEMPLATE
				<input type="checkbox"/>	REMOVE

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FIG. 9

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CREATE/MODIFY  
LIBRARY TEMPLATE

DESCRIPTION:

TEMPLATE NAME:

DIVISION:  SELECT DIVISION  DEFAULT TEMPLATE FOR DIVISION

© NAME OF TEMPLATE ROOT FOLDER

FOLDER 1  
 FOLDER 2  
 FOLDER 3  
 FOLDER 4

CREATE FOLDER  REMOVE  DONE

FIG. 10

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CREATE/MODIFY LIBRARY TEMPLATE FOLDER	
SUMMARY INFORMATION:	
PARENT FOLDER:	ROOT FOLDER <input type="button" value="SELECT"/>
FOLDER NAME:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
<input type="checkbox"/> INHERITED FOLDER (NOTE: FILES PLACED INTO THIS FOLDER WILL AUTOMATICALLY INHERIT THE PERMISSIONS OF THIS FOLDER) <input type="checkbox"/> GE FOLDER (NOTE: THE SPONSORING GE BUSINESS USERS WILL BE AUTOMATICALLY PERMISSIONED ON THIS FOLDER)	
DEFAULT PERMISSION INFORMATION	
GROUP	PERMISSIONS
GE GROUP	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
CUSTOMER GROUP	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
OTHER	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
<input type="button" value="DONE"/>	<input type="button" value="CANCEL"/>

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FIG. 11

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TEMPLATES						
DIVISION: DIVISION 1						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	
NEW TEMPLATE		TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 1	✓	TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 2		TRENT	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DIVISION: DIVISION 2						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	
TEMPLATE 3		JOHN	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 4	✓	TON	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DIVISION: DIVISION 3						
TEMPLATE	DEFAULT	LAST MODIFIED BY	LAST MODIFIED	COPY	REMOVE	
TEMPLATE 5	✓	JOHN	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEMPLATE 6		JILL	01/01/2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/> REMOVE
						<input type="checkbox"/> CREATE TEMPLATE

FIG. 12



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CREATE/MODIFY TEMPLATE			
NEW TEMPLATE			
TEMPLATE NAME : <input type="text"/>	DESCRIPTION: <input type="text"/>		
DIVISION: <input type="checkbox"/> -SELECT ONE OF THE FOLLOWING- <input checked="" type="checkbox"/>	DEFAULT TEMPLATE FOR DIVISION		
<input type="checkbox"/> EXPAND ALL <input type="checkbox"/> COLLAPSE ALL			
	CUSTOMER REQUEST DATE	HIDE	REMOVE
<input type="checkbox"/> 1 MILESTONE NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2 TASK NAME 2		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 SUB-TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2 SUB-TASK NAME 2		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2 MILESTONE NAME 2		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 SUB-TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 3 MILESTONE NAME 3		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 1 SUB-TASK NAME 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> SORT <input type="checkbox"/> CREATE MILESTONE <input type="checkbox"/> CREATE TASK <input type="checkbox"/> DONE <input type="checkbox"/> CANCEL <input type="checkbox"/> REMOVE			

FIG. 13



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CREATE DEAL

SELECT THE FIRST LETTER: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
OR  
SEARCH: BEGINS WITH:  CONTAINS:

COMPANY NAME:  LOADSURE  
EAGLE FINANCIAL  
XYZ DATA SYSTEMS

SEARCH  NEW COMPANY

DEAL NAME:   
TIMELINE TEMPLATE:  DEFAULT TIMELINE TEMPLATE   
LIBRARY TEMPLATE:  DEFAULT LIBRARY TEMPLATE

FIG. 14

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VIEW PROJECT SUMMARY																																																										
LOADSURE DEAL 2 - LOADSURE																																																										
SUMMARY	WORK GROUP	TASKS/TIMELINE																																																								
DEAL NAME: LOADSURE DEAL 2	DATE CREATED: 10/14/00	CLIENT PRIMARY CONTACT: SHERYL																																																								
COMPANY NAME: LOADSURE	TEAM LEAD: TIM	PHONE NUMBER: (317)730-4691																																																								
<table border="1"> <thead> <tr> <th>MILESTONE NAME</th> <th>CURRENT STATUS</th> <th>ORIGINAL REQUEST DATE</th> <th>CURRENT DUE DATE</th> <th>ACTUAL COMPLETION DATE</th> </tr> </thead> <tbody> <tr> <td>MILESTONE NUMBER 1</td> <td>IN PROGRESS</td> <td>12/7/01/2000</td> <td>12/15/2000</td> <td>NA</td> </tr> <tr> <td>MILESTONE NUMBER 2</td> <td>COMPLETED</td> <td>12/15/2000</td> <td>12/20/2000</td> <td>12/19/2000</td> </tr> <tr> <td>MILESTONE NUMBER 3</td> <td>COMPLETED</td> <td>12/15/2000</td> <td>12/20/2000</td> <td>12/19/2000</td> </tr> </tbody> </table>			MILESTONE NAME	CURRENT STATUS	ORIGINAL REQUEST DATE	CURRENT DUE DATE	ACTUAL COMPLETION DATE	MILESTONE NUMBER 1	IN PROGRESS	12/7/01/2000	12/15/2000	NA	MILESTONE NUMBER 2	COMPLETED	12/15/2000	12/20/2000	12/19/2000	MILESTONE NUMBER 3	COMPLETED	12/15/2000	12/20/2000	12/19/2000																																				
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1/23/00	<input checked="" type="checkbox"/>	UPDATED DISCUSSION	1/23/00	<input checked="" type="checkbox"/>	NEW DEAL TEAM MEMBER																																																					

FIG. 15



Applicant: Hornick et al. Serial No: 09/771,358 Atty. Dkt. No: 17243-00035  
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AND MANAGING DEALS  
John S. Beulick; Armstrong Teasdale LLP  
One Metropolitan Square, Suite 2600, St. Louis, MO 63102 (314) 621-5070

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MY DEALS

DIVISION TO FILTER ON: **SELECT DIVISION**

COMPANY	DEAL NAME	DIVISION	STATUS	TEAM LEAD	DATE CREATED
GARAGE TECH	GARAGE TECH PROJECT	TELECOM	WON		4/03/2000
LOAD SURE CO.	LOAD SURE 2	ENERGY	OPEN		6/10/2000
MORRIS CO.	ENTERPRISE	TELECOM	ON HOLD		4/14/2000

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CREATE/MODIFY WORK GROUP					
LOADSURE DEAL 2 - LOADSURE					
SUMMARY	DEAL TEAM	TASKS/TIMELINE	DISCUSSIONS	ALERTS	LIBRARY PROFILE
COMPANIES TO VIEW: <input type="checkbox"/> VIEW ALL COMPANIES					
COMPANY <input type="checkbox"/> MODIFY TEAM MEMBERS					
COMPANY ROLE: <input checked="" type="checkbox"/> PROVIDER	NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE EMAIL REMOVE
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMPANY <input type="checkbox"/> MODIFY RELATIONSHIPS					
COMPANY ROLE: <input checked="" type="checkbox"/> CUSTOMER	NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE EMAIL REMOVE
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMPANY <input type="checkbox"/> MODIFY RELATIONSHIPS					
COMPANY ROLE: <input checked="" type="checkbox"/> INTERMEDIARY	NAME	PRIMARY CONTACT	ACTIVE	ROLE	BUSINESS PHONE EMAIL REMOVE
	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADD COMPANY <input type="checkbox"/> SAVE <input type="checkbox"/> REMOVE					

FIG. 17



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SELECT COMPANY

SELECT THE FIRST LETTER: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
OR  
SEARCH: BEGINS WITH:  CONTAINS:

SEARCH

NEW COMPANY

COMPANY NAME:

FIG. 18



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COMPANY RELATIONSHIPS	
PERMISSIONS FOR: ENTERPRISES	
ADD TO DEAL GROUPS: <input type="checkbox"/> GE TEAM <input type="checkbox"/> CUSTOMER TEAM <input type="checkbox"/> OTHER <input type="checkbox"/> NONE	
SELECT THE COMPANIES ENTERPRISES CAN VIEW ON THE DEAL: NOTE: THIS COMPANY MAY ONLY VIEW GE AND THE COMPANIES CHECKED BELOW. RELATIONSHIPS ARE TWO-WAY.	
LOADSURE <input type="checkbox"/>	
BACK	DONE

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FIG. 19



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SELECT TEAM MEMBERS

GE CAPITAL

AVAILABLE USER(S):

JOE  
HANNA

NEW

ADD SELECTED

ADD ALL

SELECTED USER(S):

BENNIE  
TOM  
JANE

REMOVE SELECTED

REMOVE ALL

DONE CANCEL

FIG. 20



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MY PROFILE	
FIRST NAME:	<input type="text"/>
LAST NAME:	<input type="text"/>
JOB TITLE:	<input type="text"/>
BUSINESS PHONE:	<input type="text"/>
MOBILE PHONE:	<input type="text"/>
FAX:	<input type="text"/>
EMAIL ADDRESS:	<input type="text"/>
EMPLOYING COMPANY:	<input type="text"/> <input checked="" type="checkbox"/> SELECT COMPANY
ADDRESS 1:	<input type="text"/>
ADDRESS 2:	<input type="text"/>
ADDRESS 3:	<input type="text"/>
CITY/TOWN :	<input type="text"/>
STATE/PROVINCE :	<input type="text"/>
COUNTRY :	<input type="text"/>
ZIP/POSTAL CODE :	<input type="text"/>
DIVISION/SUB-DIVISION :	<input type="text"/> <input checked="" type="checkbox"/> SELECT A DIVISION / SUB-DIVISION
AUTHORITY LEVEL :	<input type="text"/> <input checked="" type="checkbox"/> SELECT AN ACCESS LEVEL
USER ID:	<input type="text"/>
PASSWORD:	<input type="text"/>
RETYPE PASSWORD:	<input type="text"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 21



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USER PROFILE	
FIRST NAME:	<input type="text"/>
LAST NAME:	<input type="text"/>
JOB TITLE	<input type="text"/>
DIVISION/SUB-DIVISION:	<input type="text"/>
AUTHORITY LEVEL:	<input type="text"/>
BUSINESS PHONE:	<input type="text"/>
MOBILE PHONE:	<input type="text"/>
FAX:	<input type="text"/>
EMAIL ADDRESS:	<input type="text"/>
EMPLOYING COMPANY:	<input type="text"/>
ADDRESS 1:	<input type="text"/>
ADDRESS 2:	<input type="text"/>
ADDRESS 3:	<input type="text"/>
CITY/TOWN	<input type="text"/>
STATE/PROVINCE :	<input type="text"/>
COUNTRY :	<input type="text"/>
ZIP/POSTAL CODE :	<input type="text"/>
USER ID:	<input type="text"/> USER 10 <input type="text"/>
PASSWORD:	<input type="text"/>
RETYPE PASSWORD:	<input type="text"/>
RESET USER PASSWORD:	<input type="checkbox"/> RESET?
DISABLE LOGIC:	<input type="checkbox"/>
ADD CREDENTIALS:	<input type="checkbox"/> ADD CREDENTIALS
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>	

FIG. 22



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FIG. 23

USER PROFILE	
NEW USER	
JOB TITLE :	MANAGER
BUSINESS PHONE :	444-555-9999
MOBILE PHONE :	444-555-9999
FAX:	444-555-9999
EMAIL ADDRESS:	USER@GKENTERPRISES.COM
EMPLOYING COMPANY:	G.K. ENTERPRISES
ADDRESS 1:	ADDRESS 1
ADDRESS 2:	ADDRESS 2
CITY/TOWN:	CITY/TOWN
STATE/PROVINCE:	STATE
ZIP/POSTAL CODE:	99999
COUNTRY:	COUNTRY
<input type="checkbox"/> DONE	



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COMPANY PROFILE									
COMPANY NAME:	<input type="text"/>	<input checked="" type="checkbox"/> CSS	<input type="text"/>						
COMPANY TYPE:									
ADDRESS 1:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ADDRESS 2:									
CITY/TOWN:									
STATE/PROVINCE:									
COUNTRY:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ZIP/POSTAL CODE:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PHONE NUMBER:									
FAX NUMBER:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WEB URL:									
LOGIC:	<input type="text"/> UNKNOWN								
<input type="button" value="CLEAR"/> <input type="button" value="ATTACH"/>									
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>									

FIG. 24

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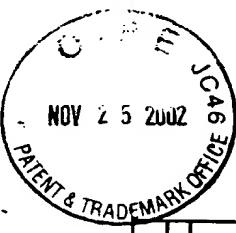


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COMPANY PROFILE	
G. K. ENTERPRISES	
ADDRESS 1:	ADDRESS 1:
ADDRESS 2:	ADDRESS 2:
CITY/TOWN:	CITY/TOWN:
STATE/PROVINCE:	STATE
COUNTRY:	COUNTRY
ZIP/POSTAL CODE	9999
PHONE NUMBER:	444-555-9999
FAX NUMBER:	444-555-9999
WEB URL:	WWW.GKENTERPRISES.COM
<input type="button" value="DONE"/>	

FIG. 25



<input type="checkbox"/> BRIEFING PAGE	<input type="checkbox"/> EXPAND ALL	<input type="checkbox"/> COLLAPSE ALL
<b>DEAL DASHBOARD</b>		
<input type="checkbox"/> <b>LOADSURE DEAL 2</b> LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 15-DEC 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 15-JAN-2001 GE PRIMARY CONTACT: TIM CLIENT PRIMARY CONTACT: CHERYL DEAL SIZE: \$50,000 PHONE NUMBER: 730-4691 PHONE NUMBER: 432-4691 YOUR OUTSTANDING TASKS: 6 NOTIFICATION SUMMARY: <input type="checkbox"/> (2) <input type="checkbox"/> (3) <input type="checkbox"/> (5) <input type="checkbox"/> (2)		
<input type="checkbox"/> <b>E INFORMATION-E INFO FINANCING</b> LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001 (CLICK HERE TO VIEW DETAILS FOR THIS DEAL)		
<input type="checkbox"/> <b>SHIP IT DIRECT - E SHIP IT FINANCING</b> LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001 (CLICK HERE TO VIEW DETAILS FOR THIS DEAL)		
<input type="checkbox"/> <b>I SHOW FINANCING</b> LAST MILESTONE: PROPOSAL ACTUAL COMPLETION DATE: 01-JAN 2000 NEXT MILESTONE: APPROVAL CURRENT DUE DATE: 02-JAN-2001 (CLICK HERE TO VIEW DETAILS FOR THIS DEAL) CLIENT PRIMARY CONTACT: HENRY PHONE NUMBER: (555)432-4691 DEAL SIZE: \$50,000 YOUR OUTSTANDING TASKS: 5 NOTIFICATION SUMMARY: <input type="checkbox"/> (2) <input type="checkbox"/> (3) <input type="checkbox"/> (5) <input type="checkbox"/> (2)		
<input type="checkbox"/> <b>ALERTS</b> <input type="checkbox"/> NO NEW ALERTS SINCE MY LAST LOGIN		
<input type="checkbox"/> <b>DISCUSSION SUBSCRIPTIONS</b> <input type="checkbox"/> <input type="checkbox"/> NO NEW DISCUSSION SUBSCRIPTIONS SINCE MY LAST LOGIN		
<input type="checkbox"/> <b>HOTLINKS</b> <input type="checkbox"/> NO NEW ITEMS SINCE MY LAST LOGIN		
<input type="checkbox"/> <b>INDEX CARD SUBSCRIPTIONS</b> <input type="checkbox"/> NO NEW SUBSCRIPTIONS SINCE MY LAST LOGIN		
<input type="checkbox"/> <b>NEWS</b> <input type="checkbox"/> <input type="checkbox"/> TOP NEWS		
<input type="checkbox"/> <b>NO NEWS FOUND CORRESPONDING TO THIS SECTION.</b>		

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FIG. 26



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CREATE/MODIFY MILESTONE		<input type="text" value="MILESTONE :"/> <input type="text" value="DESCRIPTION:"/>	<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>

FIG. 27



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CREATE/MODIFY MILESTONE													
MILESTONE:	<input type="text"/>												
HIDE FROM EXTERNAL PARTIES:	<input type="checkbox"/>												
STATUS:	<input checked="" type="checkbox"/> SELECT STATUS												
DESCRIPTION:	<input type="text"/>												
<table border="1"><thead><tr><th>CUSTOMER REQUEST DATE</th><th>DUUE DATE</th><th>ACTUAL COMPLETION DATE</th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/> CURRENT</td><td><input type="text"/></td></tr><tr><td><input type="text"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></tbody></table>		CUSTOMER REQUEST DATE	DUUE DATE	ACTUAL COMPLETION DATE	<input type="text"/>	<input type="text"/> CURRENT	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
CUSTOMER REQUEST DATE	DUUE DATE	ACTUAL COMPLETION DATE											
<input type="text"/>	<input type="text"/> CURRENT	<input type="text"/>											
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>											
<input type="checkbox"/> DONE <input type="checkbox"/> CANCEL													

FIG. 28

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CREATE/MODIFY TASK	
PARENT MILESTONE: MILESTONE 1	
TASK:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
SETTINGS:	<input type="checkbox"/> HIDE FROM EXTERNAL PARTIES <input type="checkbox"/> OMIT <input type="checkbox"/> PICK AN OWNER <input checked="" type="checkbox"/> SELECT STATUS
OWNER STATUS:	<input type="text"/> CURRENT <input type="checkbox"/> <input type="checkbox"/>
ACTUAL COMPLETION DATE	
DUE DATE	<input type="text"/>
ORIGINAL	<input type="checkbox"/> <input type="checkbox"/>
ASSOCIATIONS:	
ASSOCIATE:	<input type="text"/>
REMOVE:	<input type="checkbox"/>
DONE	<input type="checkbox"/> CANCEL

FIG. 29

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CREATE/MODIFY TASK		<input type="checkbox"/> <input type="checkbox"/>	
MILESTONE:	QUALIFIED LEAD	TASK:	<input type="checkbox"/>
DESCRIPTION:	<input type="checkbox"/>		
ASSOCIATIONS:	<u>ASSOCIATE</u> <input type="checkbox"/>		
		REMOVE	<input type="checkbox"/>
		<input type="checkbox"/> DONE	<input type="checkbox"/> CANCEL

FIG. 30

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CREATE/MODIFY SUB-TASK	
MILESTONE:	QUALIFIED LEAD
TASK:	ID CUSTOMER CTQ'S
	<input type="checkbox"/>
SUB-TASK	<input type="checkbox"/>
DESCRIPTION:	<input type="checkbox"/>
ASSOCIATIONS:	
<input type="checkbox"/> ASSOCIATE	
<input type="checkbox"/> REMOVE	
<input type="checkbox"/> DONE <input type="checkbox"/> CANCEL	

FIG. 31



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TASK ASSIGNMENT		LOADSURE DEAL 2 - LOADSURE									
SUMMARY	DEAL TEAM	TASKS/TIMELINE		DISCUSSIONS		ALERTS		LIBRARY		PROFILE	
EXPAND ALL	COLLAPSE ALL	CUSTOMER	REQUEST DATE	CURRENT DUE DATE	OWNER	EXTENAL PARTIES	HIDE FROM OMIT	EXTERNAL PARTIES	OWNER	EXTENAL PARTIES	HIDE FROM OMIT
MILESTONE NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
TASK NAME 2							<input type="checkbox"/>				<input type="checkbox"/>
SUB-TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
SUB-TASK NAME 2							<input type="checkbox"/>				<input type="checkbox"/>
MILESTONE NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
SUB-TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
MILESTONE NAME 2							<input type="checkbox"/>				<input type="checkbox"/>
TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
SUB-TASK NAME 1							<input type="checkbox"/>				<input type="checkbox"/>
<input type="button" value="DONE"/> <input type="button" value="CANCEL"/>											

FIG . 32

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**TASK NOTIFICATION**

**SEND TASK NOTIFICATIONS THROUGH EMAIL**

YES  NO

**SETTINGS FOR TASKS THAT I ASSIGN TO OTHERS:**

- NOTIFY ME WHEN TASK IS OVERDUE
- NOTIFY ME WHEN TASK IS REASSIGNED
- NOTIFY ME WHEN DUE DATE IS CHANGED
- NOTIFY ME WHEN A TASK IS COMPLETE

**SETTINGS FOR TASKS THAT I AM ASSIGNED**

- SEND TASK REMINDERS ON TASKS THAT I AM ASSIGNED
- SEND FIRST NOTICE  DAY(S) BEFORE A TASK IS DUE
- SEND FOLLOW-UP REMINDERS  EVERY DAY  UNTIL THE TASK IS COMPLETE
- DO NOT SEND TASK REMINDERS ON TASKS THAT I AM ASSIGNED

**SEND ALERT NOTIFICATION THROUGH EMAIL**

YES  NO

FIG. 33



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TASKS/TIMELINE		LOADSURE DEAL 2 - LOADSURE									
SUMMARY	DEAL TEAM	TASKS/TIMELINE		DISCUSSIONS		ALERTS		LIBRARY		PROFILE	
EXPAND ALL	COLLAPSE ALL	OWNER	CUSTOMER	REQUEST DATE	ORIGINAL DATE	ACTUAL DATE	COMPLETION DATE	CURRENT DATE	STATUS	HIDE OMIT	
<input type="checkbox"/> MILESTONE NAME 1									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> TASK NAME 1									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> TASK NAME 2									<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SUB-TASK NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SUB-TASK NAME 2								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> MILESTONE NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> TASK NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SUB-TASK NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> MILESTONE NAME 2								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> TASK NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SUB-TASK NAME 1								<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="ASSIGN"/> <input type="button" value="CREATE TASK"/>											

FIG. 34



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CREATE DISCUSSION	
DISCUSSION INFORMATION	
SUBJECT: <input type="text"/>	DETAILS: <input type="text"/>
DISCUSSION PARTICIPATION INFORMATION	
SELECT USERS AND GROUPS	
USER/GROUP	DISCUSSION PARTICIPATION
	<input type="checkbox"/> SELECT PARTICIPATION LEVEL <input checked="" type="radio"/>
	<input type="checkbox"/> SELECT PARTICIPATION LEVEL <input checked="" type="radio"/>
	<input type="checkbox"/> SELECT PARTICIPATION LEVEL <input checked="" type="radio"/>
	<input type="checkbox"/> SELECT PARTICIPATION LEVEL <input checked="" type="radio"/>
	<input type="checkbox"/> REMOVE
ASSOCIATION INFORMATION	
ADD ASSOCIATIONS:	
SELECT FROM <input type="radio"/>	GO <input type="text"/>
<input type="button"/> DONE	<input type="button"/> CANCEL

FIG. 35



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VIEW DISCUSSION       BACK     MANAGE ACCESS     DELETE     EXPAND ALL     COLLAPSE ALL

- RFO FOR HYDROGEN CHLORIDE? TIM INTELICO 23-JUN-2000  
ONOT YET. I HAVE A FEW QUESTIONS FIRST. LUKE GENCHEM 26-JUN-2000  
OWE WOULD NEED AN INITIAL SHIPMENT OF 10. 000KG. BUT FROM THEN ON IT WOULD BE A WEEKLY  
SHIPMENT OF 5. 000KG HOLLY INTELICO 23-JUN-2000  
TWICE A WEEK WOULD BE GREAT. IF POSSIBLE SAM INTELICO 23-JUN-2000
- CLARIFICATION ON RFO DETAILS LUKE GENCHEM 25-JUN 2000  
OYES. THE HYDROGEN CHLORIDE CAN BE SHIPPED WITH THE OTHER ITEMS. NO NEED FOR SPECIAL  
HANDLING TIM INTELICO 23-JUN-2000

REPLY

ASSOCIATIONS:  SELECT ITEM FROM  ADD SELECTED  REMOVE  
 SAMPLE CATALOG DOCUMENT

FIG. 36



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Title: METHODS AND SYSTEMS FOR IDENTIFYING PROSPECTIVE CUSTOMERS  
AND MANAGING DEALS  
John S. Beulick; Armstrong Teasdale LLP  
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FEEDBACK

SUBMIT

SEND TO:  
REGARDING:

DEAL TEAM LEAD  
DEAL STATUS

PLEASE CONTACT ME WITH REGARDS TO THE ABOVE DETAILS

DESCRIPTION:

SUBMIT CANCEL

FIG. 37

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FEEDBACK

YOUR FEEDBACK HAS BEEN SUCCESSFULLY SENT. WE HIGHLY VALUE YOUR  
OBSERVATIONS AND SUGGESTIONS.

THANK YOU

THANK YOU FOR TAKING THE TIME TO GIVE US VALUABLE FEEDBACK.  
PLEASE FEEL FREE TO GIVE US FEEDBACK AT ANY POINT OF YOUR RELATIONSHIP  
WITH US. YOUR OPINION MEANS A LOT.

CLOSE

FIG. 38



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SENT FROM	DATE	REGARDING	COMMENTS
JULIE	01/20/01	DEAL STATUS	ENTER TEXT IS DISPLAYED HERE IN THIS COLUMN THIS IS THE TEXT THAT IS GIVEN
FRED	01/20/01	DEAL STATUS	THIS IS THE TEXT FIELD THAT IS USED TO DISPLAY THE INFORMATION AS IT WAS ENTERED ON THE FORM
HILLARY	01/20/01	DEAL STATUS	ENTER TEXT IS DISPLAYED HERE

FEEDBACK  
VOC RECEIVED

FIG. 39



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<b>VIEW LIBRARY</b>	<b>LOADSURE DEAL 2 - LOADSURE</b>		
	<b>SUMMARY</b>	<b>WORK GROUP</b>	<b>TASKS/TIMELINE</b>
	<b>DISCUSSIONS</b>	<b>LIBRARY</b>	
	<b>EXPAND ALL</b> <b>COLLAPSE ALL</b> SHOW FLAGS FOR ITEMS WHICH ARE NEW/UPDATES IN THE LAST <b>LAST LOGIN</b> <input checked="" type="checkbox"/>		
	<input type="checkbox"/> COMPANY FOLDER <input type="checkbox"/> DUE DILIGENCE <input type="checkbox"/> LEGAL <input type="checkbox"/> FINANCIAL <input type="checkbox"/> CLOSING		
	<b>ADD CONTENT</b> <b>CREATE FOLDER</b>		

FIG. 40



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CREATE/MODIFY CATEGORY	
SUMMARY INFORMATION	
PARENT FOLDER: DUE DILIGENCE	<input type="button" value="SELECT"/>
FOLDER NAME:	<input type="text"/>
DESCRIPTION:	<input type="text"/>
INHERITED FOLDER	
PERMISSION INFORMATION	
SELECT USERS AND GROUPS	
USER/GROUP	
GE GROUP	<input type="checkbox"/> VIEW, EDIT PERMISSION <input checked="" type="checkbox"/>
CUSTOMER GROUP	<input type="checkbox"/> VIEW, EDIT <input checked="" type="checkbox"/>
OTHER GROUP	<input type="checkbox"/> VIEW <input checked="" type="checkbox"/>
USER 1	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
USER 2	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
USER 3	<input type="checkbox"/> SELECT PERMISSION <input checked="" type="checkbox"/>
PERMISSIONS	
REMOVE	<input type="checkbox"/>
DONE <input type="button" value="CANCEL"/>	

FIG. 41

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FIG. 42

INDEX CARD			
SUBSCRIBED: <input type="checkbox"/>			
STEP 1: ENTER FILE NAME AND DESCRIPTION			
FILE NAME:	<input type="text"/>		
DESCRIPTION:	<input type="text"/>		
STEP 2: SELECT FILE FROM LOCAL SYSTEM OR ENTER A URL			
FILE PATH:	<input type="text"/> <input type="button" value="BROWSE"/>		
URL FULL URL:	<input type="text"/>		
STEP 3: SELECT A TARGET FOLDER FOR THE FILE			
TARGET FOLDER FOR FILE:	<input type="button" value="SELECT"/>		
DUE DILIGENCE			
STEP 4: ADD ASSOCIATIONS TO THE FILE			
SELECT FROM <input type="checkbox"/>	<input type="button" value="SELECT"/>		
REMOVE	<input type="button"/>		
STEP 5: PERMISSION USERS AND GROUPS ON THE FILE			
SELECT USERS AND GROUPS			
USER/GROUP	PERMISSIONS	NOTIFY	REMOVE
USER 1	<input type="checkbox"/> VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
USER 2	<input type="checkbox"/> VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GROUP 3	<input type="checkbox"/> VIEW, EDIT	<input checked="" type="checkbox"/>	<input type="checkbox"/>



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E - G. 43

INDEX CARD				
<input type="checkbox"/> SUBSCRIBED: <input type="checkbox"/>				
<b>SUMMARY INFORMATION:</b>				
FILE NAME:	LEGAL.DOC			
DESCRIPTION:	THESE ARE THE LEGAL RAMIFICATIONS OF THE DEAL			
STATUS:	CHECKED-IN			
<b>VERSION INFORMATION:</b>				
#	LAST MODIFIED	MODIFIED BY	COMMENTS	REMOVE
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
<input type="checkbox"/> CHECK OUT <input type="checkbox"/> LOCKDOWN DOCUMENT				
<b>TARGET FOLDER INFORMATION:</b>				
<input type="checkbox"/> SELECT				
<b>DUE DILIGENCE</b>				
<b>ASSOCIATION INFORMATION:</b>				
<input type="checkbox"/> SELECT FROM <input checked="" type="checkbox"/> <input type="checkbox"/> SELECT				
<input type="checkbox"/> BUSINESSPLAN.DOC				
<input type="checkbox"/> REMOVE				
<b>PERMISSION INFORMATION:</b>				
<b>SELECT USERS AND GROUPS</b>				
<input type="checkbox"/> PERMISSIONS <input type="checkbox"/> NOTIFY <input type="checkbox"/> REMOVE				
<b>USER/GROUP</b>				



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<b>VIEW PROFILE</b>		<b>SUMMARY</b>	<b>WORK GROUP</b>	<b>TASKS/TIMELINE</b>	<b>DISCUSSIONS</b>	<b>LIBRARY</b>	<b>PROFILE</b>
							<input type="checkbox"/> CONFIDENTIAL DEAL
		<b>PROFILE:</b>					
<b>DEAL STATUS</b>	<input type="checkbox"/> SELECT DEAL STATUS	<input type="checkbox"/> DESCRIPTION:	<input type="checkbox"/> VENTURE	<input type="checkbox"/> COMPLETE	<input type="checkbox"/> DEAL ID	<input type="checkbox"/>	
<b>DEAL TYPE</b>	<input type="checkbox"/> SELECT DEAL TYPE		<input type="checkbox"/> DIVISION	<input type="checkbox"/> SELECT	<input type="checkbox"/> DIVISION	<input type="checkbox"/>	
<b>TOTAL DEAL SIZE/ROUND</b>	<input type="checkbox"/> 0.0	( IN US\$MM )	<input type="checkbox"/> SUB-DIVISION	<input type="checkbox"/> SELECT	<input type="checkbox"/> SUB-DIVISION	<input type="checkbox"/>	
<b>COMPANY DESCRIPTION</b>	<input type="checkbox"/>						
		<input type="checkbox"/> SAVE	<input type="checkbox"/> CANCEL	<b>VOC SUMMARY</b>			

FIG. 45



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SEARCH PREFERENCES

DEAL ID:	<input type="text"/>	SEARCH OPTIONS O BEGINS WITH O INCLUDES
DEAL NAME :	<input type="text"/>	SEARCH OPTIONS O BEGINS WITH O INCLUDES
COMPANY NAME :	<input type="text"/>	SEARCH OPTIONS O BEGINS WITH O INCLUDES
COMPANY ROLE:	<input type="text"/> SELECT COMPANY ROLE <input checked="" type="checkbox"/>	FROM <input type="text"/> TO <input type="text"/>
DEAL STATUS:	<input type="text"/> SELECT DEAL STATUS <input checked="" type="checkbox"/>	TOTAL <input type="text"/> 0.0
SFG SOURCED:	<input type="text"/> 0.0	LAST NAME <input type="text"/>
DEAL TEAM LEAD:	<input type="text"/> FIRST NAME <input type="text"/>	LAST NAME <input type="text"/>
DEAL TEAM MEMBER:	<input type="text"/> FIRST NAME <input type="text"/>	<input type="text"/> SELECT COUNTRY/RISK <input checked="" type="checkbox"/>
COUNTRY/RISK	<input type="text"/> SELECT DIVISION <input checked="" type="checkbox"/>	<input type="text"/> SELECT SUR-DIVISION <input checked="" type="checkbox"/>
DIVISION	<input type="text"/> COMMON STOCK <input type="checkbox"/>	<input type="text"/> CHECK TO RECEIVE DEALS THAT CONTAIN ALL SELECTED PRODUCTS <input checked="" type="checkbox"/>
SUB-DIVISION	<input type="text"/> EQUITY-CURRENT EARNING <input type="checkbox"/>	<input type="text"/> EQUITY-NOT-CURRENT EARNING <input type="checkbox"/>
PRODUCT	<input type="text"/> LEVERAGED LEASE <input type="checkbox"/>	<input type="text"/> LIMITED PARTNERSHIP <input type="checkbox"/>
	<input type="button" value="SEARCH"/>	<input type="button" value="RESET"/>

FIG. 46

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SEARCH RESULTS

RECORDS (1-15 OF 427)  
SEARCH CRITERIA: DEAL STATUS = ACTIVE. COMPANY NAME = "LO"  
MODIFY SEARCH CRITERIA

NEXT>>

GE PRIMARY  
CONTACT

DEAL ID	DEAL NAME	COMPANY NAME	COMPANY ROLE	DATE CREATED	STATUS	DIVISION	SUB-DIVISION	GE PRIMARY CONTACT	NEXT>>
1111	LOADSURE								
	PRODUCTS								
1233	LONG1								
	PRODUCTS								
1236	LOEWCO1								
	PRODUCTS								
1334	LORDCO1								
	PRODUCTS								
2334	LOSTSYSTEMS1								
	PRODUCTS								
2458	LOB1								
	PRODUCTS								
2587	LONDON1								
	PRODUCTS								
3455	LOVLAND1								
	PRODUCTS								

DEAL ID	DEAL NAME	COMPANY NAME	COMPANY ROLE	DATE CREATED	STATUS	DIVISION	SUB-DIVISION	GE PRIMARY CONTACT	NEXT>>

FIG. 47

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FIG. 48

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GE HOME	CEF HOME	HELP
SYSTEM ADMINISTRATOR		
BRIEFING PAGE		
▷ CATALOG	▷ ALERTS	▷ DISCUSSIONS
▷ TASKS	▷ INDUSTRY TEMPLATE	▷ CUSTOMERS
▷ MY CUSTOMERS	▷ INVITE CUSTOMERS	▷ INVITE CUSTOMER
▷ MY GE SERVICES		
▷ NEWS		
▷ ADMIN		
LOGOUT		
CUSTOMER INFORMATION		
COMPANY: <input type="text"/>	SELECT COMPANY: <input type="button" value="ADD"/>	
PROSPECT: <input type="text"/>		
LOCATION: <input type="text"/>		
(CITY) <input type="text"/>		
(STATE) <input type="text"/>		
USERNAME: <input type="text"/>	(FIRST NAME) <input type="text"/>	
TELEPHONE: <input type="text"/>	(LAST NAME) <input type="text"/>	
EMAIL: <input type="text"/>		
INDUSTRY TEMPLATES		
SELECT INDUSTRY NAME: <input type="text"/>	PERSONALIZE: <input type="button"/>	
UPLOAD CUSTOM ATTACHMENTS:		
FROM CATALOG: <input type="button" value="ADD"/>		
FROM DRIVE: <input type="button" value="ADD"/>		
NEW PORTAL USER POP-UP MESSAGE		
<input checked="" type="checkbox"/> USE DEFAULT MESSAGE		
SUBJECT: <input type="text"/>		
DETAILS: <input type="text"/>		



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GE HOME	CEF HOME	NEW PORTAL USER POP-UP MESSAGE	
SYSTEM ADMINISTRATOR		<input checked="" type="checkbox"/> USE DEFAULT MESSAGE	
BRIEFING PAGE		SUBJECT:	
▷ CATALOG			
▷ ALERTS		DETAILS:	
▷ DISCUSSIONS			
▷ TASKS			
▷ INDUSTRY TEMPLATE			
▷ CUSTOMERS			
MY CUSTOMERS			
INVITE CUSTOMERS			
▷ MY GE SERVICES			
▷ NEWS			
▷ ADMIN			
LOGOUT			
SALES REPRESENTATIVE SELECTOR			
SYSTEM ADMINISTRATOR		ASSIGN	
PORTAL INFORMATION			
URL:		WWW.MYGEOFFICE.COM	
USERNAME:			
PWD:			
DONE		CANCEL	

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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE CONTACT ▼

HOME ○

SETUP GATEWAY ▽

CUSTOMER ACTIVITY ▽

RESOURCES ▽

COMPANY STATUS ▽

CONTENT CENTRAL ▽

SETUP GATEWAY  

Below are the most frequently used tools for creating and maintaining customer gateways.

- QUICK SETUP
- CUSTOM SETUP
- UPLOAD A DOCUMENT
- REMOVE A DOCUMENT
- MODIFY EXISTING CUSTOMER GATEWAY
- PREVIEW CUSTOMER GATEWAY
- DELETE CUSTOMER GATEWAY

CUSTOMER ACTIVITY  

- MOST ACTIVE USERS
- GATEWAYS BY COMPANY
- GATEWAYS BY USER
- SESSION ACTIVITY

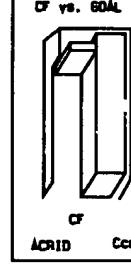
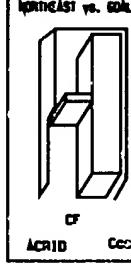
RESOURCES  

- KEY INTEREST RATES
- EDGARSCANTM
- THE E-DOCTOR
- AICPA PUBLICATIONS INDEX
- FINANCIALWEB.COM COMPANY PROFILES
- HOOVERS.COM COMPANY CAPSULES

WHAT'S NEW AT CF  

THE NORTH EAST REGION LEADS IN SALES THROUGH THE END OF Q2 AND APPEARS TO HAVE A STRONG LEAD MIDWAY THROUGH Q2. THE BZ CREDIT GROUP SHOWS A 12% INCREASE IN TRANSACTIONS AS COMPARED TO Q3 '99. COMPANY SIDE, DONE DEALS NOW AVERAGE 3.1 DEALS PER ORIGINATOR. WE'RE ON OUR WAY TO A RECORD BREAKING, HISTORY MAKING YEAR. KEEP IT UP.

COMPANY STATUS  

CONTENT CENTRAL  

- GE TOOLS & TOURS
- CASE STUDIES
- GATEWAY RESOURCES

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCE | CORPORATE INFO

1100

FIG. 50



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GE CAPITAL LOGON|PREFERENCES|HELP|SEARCH  
COMMERCIAL FINANCE

CONTACT

HOME   
SETUP GATEWAY   
CUSTOMER ACTIVITY   
RESOURCES   
COMPANY STATUS   
CONTENT CENTRAL

SETUP GATEWAY: CUSTOM SETUP

FIELD WITH \* ARE REQUIRED.

REQUIRED INFORMATION:

\*EMAIL BUSINESS/LOGIN ID:   
\*ZIP CODE:   
\*PRIMARY INDUSTRY:   
\*COMPANY NAME:   
\*TYPE OF FINANCING NEED:

LOGIN INFORMATION:

\*PASSWORD:

COMPANY INFORMATION:

SIZE OF FINANCING NEED:   
STATUS:   
# EMPLOYEES:   
SALES SIZE:   
% INTERNATIONAL SALES:   
# YEARS IN BUSINESS:

CURRENT TYPES OF FINANCING USED:

TIMING OF ADDITIONAL FINANCE NEED:

FINANCING PRODUCT:

ASSET CONCENTRATION:

CONTACT INFORMATION:

PREFIX:   
FIRST NAME:   
MIDDLE INITIAL:   
LAST NAME:   
STREET ADDRESS 1:   
STREET ADDRESS 2:   
CITY:   
STATE:   
PROVINCE:   
COUNTY:   
COUNTRY:   
PHONE BUSINESS:   
EXTENSION:   
FAX BUSINESS:   
TITLE:

REGISTER

CLEAR

1120

FIG. 51



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GE CAPITAL | LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

CONTACT

HOME  
CASE STUDIES  
RESOURCES  
GE TOOLS & TOURS  
DOCUMENT CONTROL

PROSPECT INC GATEWAY

MESSAGE CENTER

THIS IS A DEFAULT MESSAGE WHEN NO REAL MESSAGES ARE THERE IN INBOX. THIS CAN BE CHANGED THROUGH  
OCC WELCOME TO A PERSONALIZED SERVICE THAT PROVIDES YOU WITH IMMEDIATE ACCESS TO GE EXPERTISE  
BASED UPON YOUR SPECIFIC BUSINESS.

CASE STUDIES

MOLD & TOOL

MOLD & TOOL HAS A  
MULTI-LAYERED FINANCIAL RELATIONSHIP WITH  
GE CAPITAL COMMERCIAL FINANCE, WHICH  
CURRENTLY HELPED IT REFINE

FULL CASE STUDY

OTHER RELATED CASE  
STUDIES:

SEAFOOD  
TECHNOLOGIES

SHOW ALL CASE STUDIES

SPOTLIGHT FEATURE

MONDAY FEATURE

SIX SIGMA

TODAY'S COMPETITIVE ENVIRONMENT LEAVES NO  
ROOM FOR ERROR. WE MUST DELIGHT OUR CUSTOMERS  
AND RELENTLESSLY LOOK FOR NEW WAYS TO EXCEED  
THEIR EXPECTATIONS. THIS IS WHY SIX SIGMA  
QUALITY HAS BECOME A PART OF OUR CULTURE.

RESOURCES

HERE YOU CAN FIND NEWS, TRENDS AND USEFUL  
INFORMATION TO HELP YOU MAKE BETTER BUSINESS  
DECISIONS.

- DONE DEALS
- TODAY'S BUSINESS NEWS
- GLOSSARY

SHOW ALL RESOURCES

GE TOOLS & TOURS

AS A GE CUSTOMER YOU WILL HAVE  
ACCESS TO EXCLUSIVE TOOLS AND  
INFORMATION DESIGNED TO  
STREAMLINE THE FINANCING  
PROCESS

CREDIT LINE CALCULATOR

GAUGE HOW MUCH YOU CAN BORROW FROM  
COMMERCIAL FINANCE

GE LINK DEMO

EXCHANGE DOCUMENTS TO GET MORE EFFICIENT  
TO CREDIT FACILITIES.

MYGEDEAL.COM (WORKFLOW) DEMO

VIEW A DEMO OF YOUR EXCLUSIVE SYSTEM FOR  
EXPEDITING YOUR FINANCING

SHOW ALL GE TOOLS & TOURS

DOCUMENT CENTRAL

WELCOME LETTER	
PRESENTATION1	10/12/00
DOCUMENT1	10/13/00
PRESENTATION2	10/12/00
DOCUMENT2	10/12/00

SHOW ALL DOCUMENTS IN MY DOCUMENT CENTRAL

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO

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FIG. 52



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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

MY CONTACTS

HOME  
GE TOOLS & TOURS  
RESOURCES  
GE CAPITAL BUSINESSES  
DOCUMENT CONTROL  
CUSTOMER CENTRAL

MESSAGE CENTER

WELCOME TO YOUR GATEWAY PAGE. A PERSONALIZED SERVICE THAT PROVIDES YOU WITH IMMEDIATE ACCESS TO GE EXPERTISE BASED UPON YOUR SPECIFIC NEEDS. IF YOU HAVE ANY QUESTIONS, YOUR REP IS JUST A CLICK AWAY.

TOOLS & TOURS

AS A GE CUSTOMER YOU WILL HAVE  
ACCESS TO EXCLUSIVE TOOLS AND  
INFORMATION DESIGNED TO  
STREAMLINE THE FINANCING PROCESS.

MYGEDEAL.COM DEMO

VIEW A DEMO OF OUR EXCLUSIVE SYSTEM FOR  
EXPEDITING YOUR FINANCING.

GE LINK DEMO

EXCLUSIVE DOCUMENTS TO GET MORE EFFICIENT  
ACCESS TO CREDIT FACILITIES.

CREDIT LINE CALCULATOR

GAUGE HOW MUCH YOU CAN BORROW FROM  
COMMERCIAL FINANCE

SHOW ALL GE TOOLS & TOURS

RESOURCES

- DONE DEALS
- FREQUENTLY ASKED  
QUESTIONS

MORE RESOURCES

CUSTOMER CENTRAL

- HOTLINK TO THE  
CUSTOMER ADVOCATE  
(SUGGESTIONS, ISSUES, COMPLAINTS)

- NEW SURVEY

(A FEW QUESTIONS TO HELP US IN  
THE RIGHT DECISION)

COMPANY INCORPORATED GATEWAY

SPOTLIGHT FEATURE

PERIODICALLY UPDATED NEWS/MARKETING CONTENT  
POSSIBLE ITEMS INCLUDE:

- JACK WELCH'S  
SHAREHOLDER LETTER
- BUSINESS CREDIT  
ADVISORY SERVICES

GE CAPITAL BUSINESSES

CROSS-SELLING AREA, INCLUDING:

• FEATURED BUSINESS

(FOR EXAMPLE, COMMERCIAL EQUIPMENT FINANCING)  
WITH BRIEF DESCRIPTIONS NOTATED DYNAMICALLY

• LIST OF 2-3 OTHER  
COMPANIES

EACH LINKING OUT TO A MORE DETAILED  
DESCRIPTION

DOCUMENT CENTRAL

ADVANTAGE OF REVOLVERS	9/15/00
REVOLVER APPLICATION	9/8/00
CF ASSET BASED LENDING GUIDE	9/2/00
SIX SIGMA	9/31/00

SHOW ALL DOCUMENTS IN FILING CABINET

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO

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FIG. 53



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GE CAPITAL LOGON | PREFERENCES | HELP | SEARCH  
COMMERCIAL FINANCE

MY CONTACTS

HOME  
TRANSACTION LIBRARY

LNK1  
LNK2  
LNK3  
LNK4

SHOW ALL TRANSACTIONS  
FINANCIAL SOLUTIONS CENTER

LNK1  
LNK2  
LNK3  
LNK4

FEATURED PRODUCT  
GE CAPITAL BUSINESSES

LNK1  
LNK2  
LNK3  
LNK4

FEATURED BUSINESS  
CASE STUDIES

SWIT TECHNOLOGIES  
ENVIRONMENTAL INDUSTRIES  
VISTA FOOD EXCHANGE  
SHOW ALL CASE STUDIES  
RESOURCES

LNK1  
LNK2  
LNK3  
LNK4

SHOW ALL RESOURCES  
DOCUMENT CENTRAL  
SHOW ALL DOCUMENTS

RESOURCES  
HERE YOU CAN FIND NEWS, TRENDS AND USEFUL  
INFORMATION TO HELP YOU MAKE BETTER  
BUSINESS DECISIONS

- DONE DEALS
- FREQUENTLY ASKED  
QUESTIONS
- TODAY'S BUSINESS NEWS

MORE RESOURCES

COMPANY INCORPORATED GATEWAY

MESSAGE CENTER

WELCOME TO OUR GATEWAY PAGE. A PERSONALIZED SERVICE THAT PROVIDES YOU  
WITH IMMEDIATE ACCESS TO GE EXPERTISE BASED UPON YOUR SPECIFIC BUSINESS  
NEEDS. IF YOU HAVE ANY QUESTIONS, YOUR REP IS JUST A CLICK AWAY.

TRANSACTION LIBRARY

SHOW ALL CF TRANSACTIONS

LISTING OF MOST RECENT OR MOST RELEVANT GE DEALS, AS DETERMINED BY  
ORIGINATOR OR INTERMEDIARY CUSTOMIZATION.

FINANCIAL SOLUTIONS CENTER

CF PRODUCT OFFERINGS

- FEATURED PRODUCT WITH BRIEF DESCRIPTION  
NOTATED DYNAMICALLY
- LIST OF OTHER PRODUCTS EACH LINKING OUT  
TO A MORE DETAILED DESCRIPTION

CASE STUDIES

CAPITAL BUSINESSES

TECHNOLOGIES

FACING A LIQUIDITY CRISIS, THE  
COMPANY THAT BECAME TECHNOLOGIES  
TURNED TO GE CAPITAL COMMERCIAL  
FINANCE. FIRST TO QUICLY PROVIDE  
THE SUPPORT NEEDED TO REGAIN  
PROFITABILITY AND THEN TO FINANCE  
ITS CONTINUED AND SUCCESSFUL GROWTH  
READ THE FULL CASE STUDY

• FEATURED BUSINESS

• LIST OF 2-3 OTHER  
COMPANIES

VIDEO: REALPLAYER

VIDEO: WINDOWS MEDIA PLAYER

OTHER RELEVANT CASE STUDIES:

ENVIRONMENTAL INDUSTRIES

VISTA FOOD EXCHANGE

SHOW ALL CASE STUDIES

SPOTLIGHT FEATURE

OUR VALUE PROPOSITION

WE ARE ONE OF ONLY A FEW AAA-RATED  
LENDERS IN THE UNITED STATES WHICH  
GIVES US THE STABILITY TO VIEW EVERY  
NEW CUSTOMER AS THE START OF A  
LONG-TERM RELATIONSHIP

FIND OUT HOW OUR PURELY J TO O  
APPROACH MAKES US SIGNIFICANTLY  
DIFFERENT THAN A BANK

DOCUMENT CENTRAL

ADVANTAGE OF REVOLVERS	9/15/00
REVOLVER APPLICATION	9/8/00
CF ASSET BASED LENDING GUIDE	9/2/00
SIX SIGMA	9/31/00

SHOW ALL DOCUMENTS IN FILING CABINET

GE HOME | GE BUSINESSES | SMALL BUSINESS | INDUSTRY SOLUTIONS  
HOME SOLUTIONS | PERSONAL FINANCES | CORPORATE INFO



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GE CAPITAL COMMERCIAL FINANCE		LOGOFF   PREFERENCES   HELP   SEARCH	CF DIRECTORY LIST
HOME	CUSTOMER CO.	49 SESSIONS	
SETUP GATEWAY		7 SESSIONS	
CUSTOMER ACTIVITY		GATEWAY SET UP ON NOV 27.2000	
RESOURCES		FIRST LOGIN DATE NOV 27.2000	
COMPANY STATUS			
CONTENT CENTRAL			
FEATURE		30 DAYS	31-60 DAYS
THE FOOD EXCHANGE	CASE STUDIES	3	0
COUNTRY GOLF	CASE STUDIES	2	0
ACCESS GE	GET TOOLS & TOURS	2	0
SUPPLY CHAIN MANAGEMENT	CASE STUDIES	1	0
JOE'S SEAFOOD	CASE STUDIES	1	0
LETTER TO SHARE OWNERS	1	0	0
RESOURCE-5	SPOTLIGHT FEATURE	1	0
GE LINK DEMO	RESOURCES	1	0
WORKFLOW DEMO	GET TOOLS & TOURS	1	0
	TOTAL	13	0
			13

FIG. 55